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global  
SOFT DRINKS



Soft Drinks Service

# China

Soft Drinks Review

2009 Cycle

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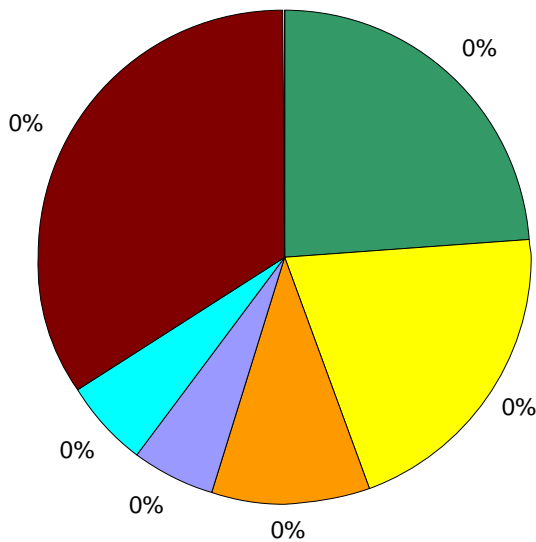
**BOTTLED WATER - CATEGORY PROFILE**

**Key Facts**

Market Size	Million Litres	Litres per Capita		
Consumption 2008				
Growth	CAGR % 03-08	CAGR % 05-08	CAGR % 07-08	
Consumption M Litres				
Market Value	RMB Million	RMB/Litre	US\$ Million	US\$/Litre
Value (at consumer price)				
Segmentation 2008	Still	Carbonated		
% Share				
Distribution 2008	Off-Premise	On-Premise		
% Share				
Packaging 2008	PET	Polycarbonate	HDPE	Glass
% Share				

SOURCE : Trade Interviews; Canadean Wisdom

**Chart - Bottled Water Leading Trademark Owners 2008**



- DANONE GROUP
- TINGYI HOLDING CORP
- ZHEJIANG NONGFUSHANQUAN WATER CO LTD
- CHINA RESOURCES ENTERPRISES
- COCA-COLA
- OTHERS
- DISTRIBUTORS' OWN BRANDS

SOURCE : Canadean Wisdom



**Bottled Water Commentary**

**Current & Emerging Trends**

**Outlook**

**Segmentation**

**Functional Products**

**DOBs/DOB Producers**

**Marketing**



**Bottled Water Commentary**

**Pricing/Valuation**

**Distribution**

**Packaging**

**Bottled Water  
New Products  
2008**

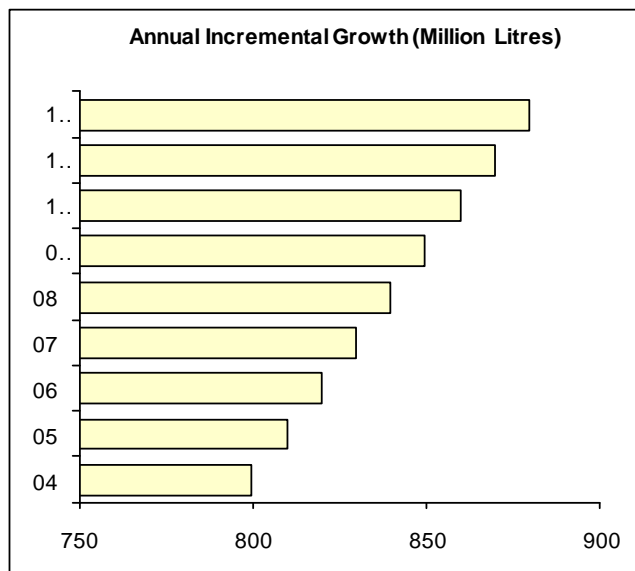
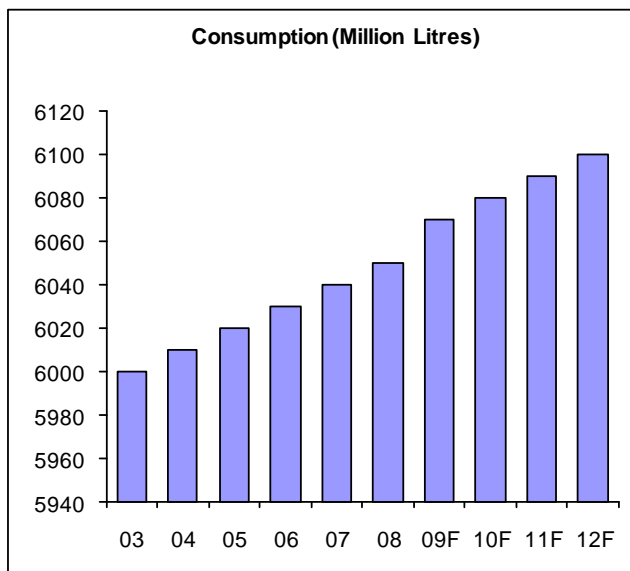


**Bottled Water Commentary**

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<b>Bottled Water - Consumption, 2003-2009F</b>	2003	2004	2005	2006	2007	2008	2009F
Consumption (million litres)							
Litres per capita							
Population (millions)							
Import Volume (million litres)							
Imports` Share Of Consumption %							



<b>Bottled Water - Forecast Consumption, 2010F-2012F</b>	2010F	2011F	2012F
Consumption (million litres)			
Litres per capita			
Population (millions)			



<b>Bottled Water - Segments, 2007-2009F</b>	<b>2007</b>	<b>2008</b>	<b>2009F</b>
	%	%	%
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
Still			
Sparkling			
Mineral/Spring			
Table			

<b>Bottled Water - Packaging, 2007-2009F</b>	<b>2007</b>	<b>2008</b>	<b>2009F</b>
	%	%	%
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
Glass			
Plastic			
- PET			
- PVC			
- Other Plastic			
Board			
Metal			
Other Packaging Material			
Returnable/refillable			
One-Way/non-refillable			
Single-serve (<= 60cl)			
Multi-serve (> 60cl)			

<b>Bottled Water - Distribution, 2007-2009F</b>	<b>2007</b>	<b>2008</b>	<b>2009F</b>
	%	%	%
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
Off-Premise (Retail/At Home)			
On-Premise (Away from Home)			

<b>Bottled Water - Leading Companies, 2007-2008</b>	<b>2007</b>	<b>2008</b>
	%	%
Danone Group		
Tingyi Holding Corp		
Zhejiang Nongfushanquan Water Co Ltd		
China Resources Enterprises		
Coca-Cola		